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ATTITUDES AND BEHAVIORS OF CROATIAN CONSUMERS TOWARDS WINE PURCHASING

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ABSTRACT

This paper focuses on the importance of consumers' habits, preferences and needs in the Croatian wine market to have a better understanding of consumer purchase and consumption behavior. Survey was conducted on Croatian consumers to identify purchasing variables and explain consumer attitudes and behaviors. Along with the online survey, results were also provided using additional journals and research examples. Both measures offered a better understanding of the issues mentioned. Additionally, both may be used in order to implement effective marketing strategies. The results are essential for the preservation of Croatian wine and purchase growth, but also consumption. Moreover, they offer foundations on which to improve Croatian wine offering.

KEY WORDS

Attitudes & Behaviors, Consumer, Wine

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CHAPTER I: Introduction

Over the last decade wine industry has been experiencing many changes which have been influencing both consumers and producers, which led to stronger competition. Croatian wine industry has specifically faced problems as Croatia became the member of the European Union. Croatia entered the single market with no tariffs and thus experiencing competitive pressure from European countries which had dominated world's wine industry. Another problem was the growth in production and consumption of "New World" countries such as United State of America, Australia, Chile and Argentina (Anderson, 2004).

In the last 20 years Croatian wine consumption has fallen to 20 liters per capita per year. However, it is interesting to note that while the wine consumption has fallen, there has been a significant increase in beer consumption, which is wine's competitive drink. To put it into a prospective, beer consumption has grown up to 80 liters per capita per year- which is almost four times more than wine consumption per capita per year. This trend has specifically been seen in the Croatian young adult population, which age group will be discussed further in this paper.

The aim of the study was to determine the attitudes and behaviors of Croatian population towards wine purchasing. Attitudes and perception in this case include preferences and buying behavior. The research was carried out in two steps. The first step included using methods of online survey questions focusing on the demographic of the people who took the survey, as well as their behaviors and attitudes. Questions included factors such as gender, age, frequency, place of consumption, occasion, place of purchase, sort, origin, preferences, influence and much more. As online survey was used in order to quantify consumption of wine, the second step included detailed analysis of certain factors. Unfortunately the demographics showed no one above the age of 55 took the online survey, which could be seen as the limitation. One of the possible reasons could be the lack of technological involvement and knowledge with persons in similar age group. Despite that, the results obtained through this research, can be used as a good foundation for wine marketing purposes among young adults in Croatia for an example. Interestingly, other countries, such as the United States have already recognized young adults as one of their primary focus groups. Some of their marketing campaigns are solely focused on this specific age group as they tend to analyze young adults' consumer power and purchasing influence – making them their future customers and consumers.

Due to Croatia entering the European Union, according to economic forecast Croatian wine greatest challenge is imported wine. Imported wine offers lower prices and stronger advertising influences. However, Croatian wine enjoys Croatians consumers' loyalty, as well as regional wine loyalty. Despite that, the future and good business plans will show whether Croatian wine makers can solely rely and retain that loyalty, or will the cheaper more aggressive imported wine take over Croatian market. Competitive advantage could be increased by investments in brand development, technological production development and stronger advertising policies. Joint marketing is also something Croatian winemakers will have to consider. Furthermore, winemakers should take advantage of their authentic wines and specific geological areas and include them as a part of Croatian tourism. Such marketing policies should include authenticity, regional differences, and history of origin and before all storytelling. Discovering consumers' attitudes and behaviors of Croatian consumers toward wine purchasing will allow wine marketers to develop appropriate marketing policies. Consequently new marketing programs and policies will result in attracting new customers and increasing sales and consumption in Croatian country as well as the consumption of Croatian wine behind country borders.

CHAPER II: Theoretical Framework

2.1. Literature Review

Consumer wine purchases differ among individuals depending on their behavior and attitudes while affected by numerous factors. By determining consumer wine preferences, attitudes and purchasing behavior, marketers can identify the corresponding marketing program to satisfy customers' needs and increase sales. The understanding of consumer attitude and behavior also takes the central place in marketing as it is essential for giving insight into reasons why consumers behave as they do (Senečić, 1997). Consumer attitudes also explains whether customers have positive or negative feeling about the object, or activity (Pride and Ferrell, 1991), which is researched by investing four key functions for individuals: knowledge function, value-expressive function, utilitarian function and ego-defensive function (Grewal et al., 2000). All four functions have an influence on an attitude of the individual yet there is usually one with a major role, and for this paper that is a knowledge function (Hawkins, Best and Coney, 2004). Knowledge function is important as paper also researches consumer purchasing behavior. In this case, knowledge function is formed and determined by customers who prior to it, organize their beliefs on object, like in this case, brands. The comprehension of knowledge function partly explains the relationship between attitude and behavior. Firstly, according to Soonthonsmai (2001), purchasing behavior is the act of an individual buying a specific product, which is represented by wine in this paper. Simplified, attitude is an approval or disapproval of something based on a feeling, opinion or belief while behavior is influenced and could be predicted by attitude. Meaning behavior is an action on reaction in response to the feeling, belief or opinion. On the other hand, some research claims that the opposite can happen as well which means behavior can have an effect on attitudes. The reversal process occurs when attitude is learned and formed on the past behavioral experiences (Fill, 2006).

According to the research by Hollebeek et al. (2007) there is also a relationship between a consumer wine purchases behavior and consumer's level of involvement. The research results showed that high-involved consumers were more focused on the region, while low-involved consumers found price to be more important. Lockshin et al. (2006) expanded the research and discovered that besides the price, low-involved consumers also based their decisions on awards, while high-involved consumers also find combined attributes important.

Furthermore, many scholars have researched and learned that there are many factors that have an influence on the wine selection process, as wine is in fact a complex product (Hall et al., 2002). Extrinsic and intrinsic cues represent those factors helping consumers in the decision making process and while extrinsic cues include price, packaging and brand name, intrinsic cues includes any product characteristic inherent in the product itself (Teas and Agarwal, 2000). Consumers observe extrinsic cues when it is hard to determine the quality of the wine due to its many attributes. According to research two such cues are country of origin and price that are regularly used in the wine buying process (Dodds, 1991). Likewise, Ritchie et al. (2010) researched the importance of price in wine buying process with the help of the focus groups. The goal of the research was to understand the capability of wine sellers to get consumers to trade up and the research discovered that price is the most important attribute because supermarkets focus on price discounts. These cues are also lower-level clues which implies that they can be changed without changing the product, while intrinsic cues are the opposite, higher-level cues and are directly related to the product. To use the advantage of the research on cues, marketers should comprehend the influences of the cues on the decision process of choosing the quality wine in order to evaluate it and focus on attributes which influence consumers' quality assessment.

The numerous wine attributes were researched by Casini et al. (2009) and emphasized previous experience, taste of wine and recommendations as the most important attributes, which varied among respondents based on age and involvement level. Another study, concluded that in the traditional producing countries the function of wine has been switching from nutrition to pleasure. In these countries wine has become a status symbol, which is consumed on special occasions. The study also revealed that younger generations have started to drink wine less frequently, which before as the opposite as drinking wine would be away for them to socialize. They have also been following the footsteps of older consumers as they are buying better quality wine with protected designation of origin (Hertzberg and Malorgio, 2008). Yet, the New World country, USA, the younger generation, or in this study referred to as Millennials, the results were opposite as the study showed the need to associate wine with fun, social and relaxing environments (Nowak, 2007).

2.2. Croatian Wine Market

Today there are more than million wine producers with first ten highest producing countries controlling more than 80% of production and on more than 4,4 million vineyard hectares (M. Stanley, 2013). France and Italy are included in those countries as they have been replacing each other as first and second highest producing country over the last few years. Italy was the number one wine producing country in 2009 and 2010 while France was able to keep the first place in 2008 and 2011. France produced 18.62% liters of total wine in 2011, and Italy 15.97%. Spain took the third place on the list with 13.12% followed by USA with 10.06% liters produced. Croatia found itself further down on the list with only 0.47% of total liters produced, which is 125,000,000 liters of vine, but also a drop from 2.19% in 2008. Fortunately, the consumption of wine in Croatia rose in 2011 with the comparison to 2010 by 1.7% and 3.2% to 2008, with the 0.5% of the world's total consumption of wine. On the same list, USA took the first place with 13.47% of world's total consumption (Wineinstitute, 2011).

In 2010 Croatia exported wine is worth $11,8 million, at the same time imported has a value of $21,1 million. These numbers represent 2,463 tons of wine exported and six times more of wine imported, 14,833 tons. In the same year reports show the 688,231 hectoliters of the total wine trade, mostly represented by quality wine (Cro-wine, 2013).

According to Protected Designations of Origin, made by Ministry of Agriculture to correspond the legislation of wine sector to EU legislation, there are three main wine regions, while there were two before. Therefore, Croatia is divided into Eastern Continental Croatia and Western Continental Croatia on the north and Coastal Croatia in the south with twelve sub-regions. Podunavlje and Slavonija belong to Eastern Continental region, while Moslavina, Prigorje-Bilogora, Plešević, Pokuplje and Zagorje-Međimurje are a part of Western Continental region. Coastal Croatia includes Ista, Croatian Coast, Northern Dalmatia, Dalmatian Interior, Central and South Dalmatia. In those regions there are three main grape varieties which take 45% of the total assortment, which includes *graševina, istarska malvazija* and *plavac.* The other 55% is composed of many other grape varieties from which many smaller series are produced, amongst others (Gašparec-Skočić, 2007).

Grape varieties mentioned are also part of the rich indigenous grape assortment which is one of the main strengths of Croatian wine sector. Other indigenous varieties include *teran, žlahtina, kraljevina, moslavac, babić* and *vugava*, among others. However, there is a great potential for further development of wine sector as altogether there are 130 indigenous grape varieties and many of them do not have an economic importance (Gašparec-Skočić, 2007). These grape varieties diversify Croatian wine sector from other countries and offers it a potential to become a recognized wine country. Thus Croatia should invest in the projects for conversation of these grape varieties as they have been disappearing. Today, there are four times less indigenous sorts present than 100 years ago in Croatia. The number are worse in the northwestern Croatia as other European countries whose sorts have forced Croatian's out.

Croatia is able to have all these varieties of grape sorts due to the suitable geographical and climate conditions that also enable long tradition and experience of quality wine production in Croatia, another advantage of Croatian wine sector. However, when

Croatia became the twentieth member of the European Union on the first of July 2013, which presents a huge threat to Croatian wine producers as cheaper wine are now easily imported from the countries of the EU. The imported wines will decrease the competitiveness of domestic wine, which is low as it is. Croatian wine also faces a threat as it is exported due to its higher price (Božić, 2008). Wine producers in Croatia are mostly small and medium family owned farms, which explains the existence of small vineyards on average. The most number of the wine producers (84%) own vineyard of one hectare while 15% are producing wine on the one to five hectare and only 1% with vineyards on more than five hectares (Gašparec-Skočić, 2007). The high number of domestic wine producers makes it harder to compete with larger producers from the EU due to their high costs of production and poor technological equipment, which are some of the weaknesses for the producers.

Croatian has the possibility to be recognized as a wine country by branding Croatian wine under the name Vina Croatia, which would increase the awareness of potential customers. The visual identity of the brand would also bring the awareness to the Croatian wine on foreign markets. By promoting the brand representing Croatian wine, building the image of Croatian wine and improving in technology of wine production, it is possible to increase the competitiveness of domestic wine (Grgić et al., 2007).

CHAPTER III: Research Methodology

To further increase wine consumption in Croatia is essential to understand consumer preferences when purchasing wine. This can be achieved by breaking down and identifying consumer behavior and attitudes while purchasing and consuming wine. Demographic and socioeconomic status was also determined to have an understanding of who these consumers are. Through the survey this paper has tested three hypotheses.

1. “Most of Croatian consumers buy domestic wine.”
2. “Decision making as to which type a consumer will buy depends mostly on price.”
3. “Croatian consumers buy wine mainly in supermarkets and smaller grocery stores.”

Hypothesis 1 is chosen as it would be expected that Croatian consumers by Croatian wine. However, that can be questionable because, as hypothesis 2 states it is expected that price would be the most important factor in the purchase decision making process, and it is known that domestic wine are more expensive than imported wine. The difference in prices will also be even more noticeable as Croatia became the member of the European Union and entered the single market with no tariffs imposed on imported wines. Therefore, for Croatian wine industry it would have been better if the survey support prove hypothesis 1, even if the hypothesis 2 is not in line with the results as well.

Hypothesis 3, on the other hand, is less important than hypotheses 1 and 2, but can still bring high value to the wine sellers as they can distribute their assortment according to the results. Therefore, if hypothesis 3 is supported by the research than wine sellers or producers could sell more wine in the supermarkets and smaller store than in specialized stores and bring more assistants there. But also try to improve the service in other places to utilize potential to increase sales there.

Furthermore, the aim of this paper is to find out what are the attitudes and behaviors of Croatian consumers who purchase wine and how they affect purchase intentions. By discovering consumer attitudes and behaviors we can answer many questions, including supporting or not the hypotheses, such as whether Croatian buy more domestic or imported wine, what are their most important attributes when choosing to buy wine, frequency of buying and consuming wine and many more. In that way, this paper can show who Croatian wine consumers are and in what is the most effective way to approach them from a marketing perspective.

Survey was conducted to give answers to mentioned questions. The survey was done online and offered to Croatian wine consumers. Altogether there were 149 Croatian wine consumers who participated in the survey but 141 gave answers to all questions. Out of these 141 consumers, 48.23% are male and 51.77% are female. The age varied from 18, from which age it is legally allowed to consume alcohol, to 54. Unfortunately, after the age of 54, it was more difficult to find wine consumers that were able to answer the survey online. Other than that, the target market includes everyone over the age of 18. In the study the behaviors and attitudes towards wine purchasing of young adults is represented more as they take a bit less than 66.66% of all participants. Young adults include consumers between 18 and 30 years old or are referred as Generation Y born in the range of 1977 and 1999 (Nowak, 2007). Although Croatian young adults are not knowledgeable of different wine types and are not accustomed to drinking wine, they will become the next generation of wine consumers. Therefore, the understanding of their purchasing behavior and attitude brings value to Croatian wine industry. Young adults should be introduced with Croatian wine as early as possible so they start preferring it to imported wine, and so the wine industry in Croatia can grow.

Moreover, wine is perceived to be different than other alcoholic beverages, for one, it is socially acceptable, as it has health benefits and many people consume it during a meal. Wine is considered to be sophisticated as it is also consumed during business lunches as a drink (Neeley et al., 2010). This all contributes to a more elaborate decision making process for wine consumers, as it is influenced by many different factors (Schamel, 2006). For that reason, consumers look at different wine factors, cues, that help them decide which wine they will choose to purchase. The most essential wine cue is price, which is set by wine producers or vendors based on costs or other pricing elements. For wine price represents the amount of money wine consumer needs to pay to receive wine from the vendor (Fan et al., 2009). For this paper it is important to look at the price from the wine consumer's point of view, as it is needed to understand the level of importance of price in wine purchase decision making process. When it is hard to determine the quality of wine consumers look at the extrinsic cues and when only few cues are available and price, as an extrinsic cue, is the most important one (Speed, 1998). Price is not only important when it is difficult for a consumer to evaluate wine but also when there is a high risk of choosing a wrong wine (Zeithmal, 1988). Therefore, it is not surprising that survey presented price being the most important factor in decision making process, with 3.92 weighted average, which has in return proved the second hypothesis. The most consumers, 41.94% of them, perceive price as "important", while for 25.81% price is “very important”, which is also the highest percentage for “very important” out of any other factor. Not one consumer in the survey thought price was “completely unimportant”, which recognizes the significance of price in decision making process among wine consumers. Another extrinsic factor important in quality determination is country of origin, which has the second highest weighted average of 3.33. Again, the most consumers, 35.56% consider country of origin to be “important”, while 11.83% find it “very important”. Although the most important factor in decision making are price and country of origin, they are only a piece of product information and there are, thus, other cues such as packaging (label), country of origin etc. Grape type and packaging are more important to survey participants than Protected Designation of Origin (DOP), vintage year and the least important factor are awards won by wine producers.

Besides investigating intrinsic and extrinsic cues, the survey is also dealing with different wine attributes. The survey results correspond to the research done by Casini et al. (2009), as recommendations from friends and family seems to be the most important attribute and the biggest influence in wine purchasing decision making process, with 51.32%. Preferences of family members also seem to be important with 21.43%. Assortment in the store along with different wine discounts have an influence of consumers as well, as the store offering is important to 17.11% of consumers who participated in the survey.

There are different factors and influences involved in the decision making process of wine consumers, other than the ones mentioned, the survey also determines the importance of various sources of information which consumers trust and rely on when purchasing wine. The most important source of information for wine consumers seems to be previous experience, with 4.59 weighted average. According to this research, consumers rely on previous experience a lot as 67.02% finds it “very important”, and only one consumer finds it “completely unimportant”. When consumer have no prior experience they choose and purchase wine depending on the extrinsic cues mentioned. Unlike experience, media seems to be the least important source of information, with weighted average of Internet 2.22 and 1.90 of Radio/TV, and the highest percentage of consumers considering both to be “completely unimportant”. It would be expected that consumers would try to figure out which wine to buy prior to their purchase, and Internet would seem as logical source of information, at least for the young adults. However, Lockshin (2006) explains that consumers base their purchase decisions on smaller amount of information, which corresponds to survey results. On the other hand, assistance in the store or the winery seems to be a more important source of information for wine consumers. Thus, 34.41% of consumers rely on the sales assistant and consider it to be “important” while the 41.76% is of the same opinion but regarding the tasting in the store.

The survey also showed the frequency of wine purchasing among Croatian consumers, which is showed in table 1. The highest number of Croatian consumers drink wine once a week, 27.52%, while only one wine consumer responded to every day in the survey. Almost same number participants drink wine once a month, few times a month and rarely, 17.45%, 14.77% and 16.78% respectively. At the same time, only 10.74% consumes wine few times a week, with 12.08% being an occasional wine consumer.

Table 1. Survey results: consumption Frequency

How often do you drink wine?	Percentage of participants (%)
Every day	0.67%
Once a week	27.52%
Few times a week	10.74%
Once a month	17.45%
Few times a month	14.77%
Rarely	16.78%
On specific occasions	12.08%
Total	100.00%

These wine consumers drink mostly at home, 39.60% and 28.19% drink in restaurants, the same amount of consumers also drink in bars. The consumers who drink wine mostly at home buy it on most occasions in supermarkets 34.72% and 13.38% in specialty stores that only sell wine, which means that hypothesis number three has also been proven.

Furthermore, there are also different wine sorts and Croatian consumers drink almost the same amount of red, 50.34%, and white wine, 47.65%, with only 2.01% who drink rose most often. Croatian consumers also chose wine produced in Croatia 75.17% to imported wine, which is chosen as the first preference of 12.75%, as seen in Table 2. These results support the first hypothesis bringing very good news to Croatian consumers. Yet as mentioned they need to prepared that some of the imported wines may take the customers who find price the most imported attribute in decision making process. Other 12.08% of consumers do not know the origin of wine they are drinking which could mean they have no or little knowledge on wine they are drinking, a characteristic of young adults.

Table 2. Survey Results: Wine Preference

Which wine do you prefer to drink?	Percentage of participants (%)
Croatian wine	75.17%
Imported wine	12.75%
I don't know	12.08%
Total	**100.00%**

60.17% of the 75.17 % of respondents who drink Croatian wine consume wine produced in the Coastal region. Coastal region is also where many Croatians and foreign nationals go to take holiday. Therefore, as tourists drink wine on vacations, wine producers and sellers would have great benefits if they started presenting indigenous wine sorts as part of the touristic offering (Duboković, 2007). Coastal region is followed by Western Continental region with the second most number of consumers drink wine from it, 20.34%, and consumers are least consuming wine from Eastern Continental. Croatian wine from different regions has value for consumers due to different wine sorts that can be grown and produced in that specific region. Hence, it is important for Croatian wine industry to invest in preserving this regional differences that have been becoming more similar due to weather and other conditions. It is also important to be prepared for the globalization that has been narrowing wine consumption differences among regions recently (Smith and Mitry, 2007). Lastly, French wines are consumed the most out of 12.75% of consumers who prefer imported to domestic wines with 50.98%. It is no surprise that France wines, from traditionally strongest European wine country, have the highest number of consumer, more than half of participants consuming imported wines. All other imported wine have fewer Croatian consumers, highest percentages having Italy 17.65% and Spain and United States with the equal percentage, 7.84%.

CHAPTER IV: Conclusions and Recommendations

The wine market is becoming more and more challenging with new competitions growing but also the consumers are changing the purchase behaviors. Therefore it is important to adapt by understanding consumer habits, needs and expectations and implement effective marketing strategies. Consumer behavior and attitude is, thus, essential.

With the conducted survey it was easier to provide information on different consumer behavior. The survey showed that Croatian customers are consuming wine mostly few times a week or at least once a month, which are good news for the Croatian wine market. Especially considering the higher number of survey participants consuming Croatian over imported wine, and it seems Croatian consumers are loyal to domestic products. When it comes to the origin of wines, the survey respondents prefer local wines, because of the quality they believe they have as well as loyalty towards Croatian product (specific to their origin). The worrying fact is the high number of consumers who are unfamiliar or unaware of the wine they are drinking, which means Croatian wine producers should bring awareness to domestic products. The best way to do so, would be in the supermarket stores where most participants buy wine. But also by promoting the Croatian wine brand Vina Croatia which would give visual identity to Croatian wine, not only in Croatia but also in other countries. Croatian producers would benefit from it by increasing sales and investing in wine production technology to decrease their production costs.

Another way to increase wine consumption in Croatia would be to invest into event which promote quality of domestic wine. Such events would include wine tasting, gastronomic routes, wine routes and similar. Moreover, it is equally important to educate Croatian consumers about different sorts of Croatian wine as well as different types of wine consumption.

Results of the online survey also suggest Croatian wine industry must take on quick measures in order to reach out to the younger generations, that is, young adults. Existing wine consumption among young adults is minimal when compared to beer consumption. There is an assumption that there is no culture among young adults of drinking and enjoying wine. Relatively high cost if Croatian wine when compared to the imported ones, lack of promotional and educational activities in Croatian market, as well as the aggressive marketing of competitive drinks are all just some of the reasons why Croatian wine market is at one of its lowest points in the last two decades. Measures which could bring this to an end include promotion, educations and offerings. Croatian wine marketers should work together and not individually as they have up until now, and start a wine consumption promotional program especially aimed at different demographic groups, depending on their attitudes and behaviors. On the other hand, educational activities should be interrelated with fairs and wine festivals, school trips and wine routes. Guided wine tastings are just one of educational activities that could attract the young. In addition, Croatia is experiencing a shortage of low priced good quality table wines. This could also be reversed with one of the three Croatian wine promotional measures. However, it is important to note that if Croatian wine marketers do not provide such offerings, none of the above mentioned measures will have any effect.

At the moment there is no organization in Croatia dealing with common marketing of Croatian wines, which is why the brand Vina Croatia would have the possibility of success. The prerequisite for developing and undertaking the above measures and activities is the creation and opening of one joint marketing organization.

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